Child Find Export and Print Feature

This help document will demonstrate how to use the “Advanced Search” and “Export and Print” feature under the “Child Find” menu.

Access Rights

In order to export and print a child list from the “Child Find” menu, the “Child Search Export” access rights setting must be checked. Figure 1 below illustrates where the “Child Search Export” check box is located. Note: a program administrator will have access to the export feature and will need to set the access right for other BTOTS users.

Figure 1: “Child Search Export” check box.
Step 1: Select “Find Child” from the “Child” drop-down.
To view the “Find Child” list, select “Find Child” from the “Child” drop-down, as shown in Figure 2.

Figure 2: “Find Child.”
Step 2: Choose “Advanced Search.”
Once in the “Find Child” screen, click on “Advanced Search,” which will give the user the ability to select from the drop-down options. As shown in the screenshot in Figure 3 below, current drop-downs available for the “Advanced Search” are:

- eligibility category;
- service category;
- medical diagnosis;
- associated phone number;
- service provider;
- service coordinator;
- site; and
- primary language.

Appendix A: Category Drop-downs and Associated Filters provides a detailed list of all drop-downs and their associated filter options.

Figure 3: “Advanced Search” option.
Step 3: Filter children.
The “Advanced Search” feature allows the user to select one or more drop-downs in order to identify children with specific characteristics. As shown in the example of Figure 4, “Site,” “Medical Diagnosis,” and “Eligibility Category” are the three drop-downs that were chosen. For each drop-down, further select the filter(s) of interest and click “Find,” which will result in a list of children being generated who meet the specifications of the drop-down(s) and filter(s) chosen.

Figure 4: Filter Child List.
Step 4: Export child list.
Once the export access right is checked for the user and drop-downs and filters are selected, click “Export Search Result,” which is located below the child list at the bottom right, as shown in Figure 5.

![Figure 5: Export Search Result.](image-url)
Step 5: Select fields to export and print.
After clicking on “Export Search Result,” the user will be able to select the “Export Format” type, as well as the search results fields of interest to export. Four export types or formats are available to the user: (1) CSV; (2) XML; (3) PDF; and (4) HTML.

<table>
<thead>
<tr>
<th>File Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSV</td>
<td>CSV is the acronym for a “Comma Separated Values” file, which allows data to be saved in a table structured format. CSVs look like a garden-variety spreadsheet but with a .csv extension (Traditionally they take the form of a text file containing information separated by commas, hence the name).</td>
</tr>
<tr>
<td>XML</td>
<td>XML is the acronym for “Extensible Markup Language” file, which allows the text to be read by users and computers. This format is more text concentrated.</td>
</tr>
<tr>
<td>PDF</td>
<td>PDF is the acronym for “Portable Document Format,” which allows the file to be transferred and opened independent of software or hardware. This format will keep the original formatting when sent via email.</td>
</tr>
<tr>
<td>HTML</td>
<td>HTML is the acronym for “Hyper Text Markup Language,” which allows a web browser to easily read the text. This format allows images and objects to be viewable on websites.</td>
</tr>
</tbody>
</table>

Once the export format and fields are selected, click “Export,” as shown in Figure 6.

Step 6: Print child list.
Now the child list will be exported to a printable format. Figure 7 illustrates the CSV format; Figure 8, the XML format; Figure 9, the PDF format; and Figure 10, the HTML format.
Figure 7: CSV Format

```xml
<?xml version="1.0"?>
<exported_children>
  <child>
    <child_full_name>Tracy Brice</child_full_name>
    <child_aliases/>
    <gender>Female</gender>
    <child_id>GI136372</child_id>
    <date_of_birth>11/15/2013</date_of_birth>
    <service_coordinator>Oic, Chloe</service_coordinator>
    <status>Under IFSP</status>
    <site>Site JWB</site>
    <latest_referral_date>12/09/2013</latest_referral_date>
  </child>
  <child>
    <child_full_name>Erin Treefriend</child_full_name>
    <child_aliases>Dengar, Payton</child_aliases>
    <gender>Female</gender>
    <child_id>GI122852</child_id>
    <date_of_birth>03/04/2012</date_of_birth>
    <service_coordinator>Fellwood, Dylan</service_coordinator>
    <status>Under IFSP</status>
    <site>Site XCH</site>
    <latest_referral_date>05/21/2012</latest_referral_date>
  </child>
  <child>
    <child_full_name>Katherine Wolfsong</child_full_name>
    <child_aliases/>
    <gender>Female</gender>
    <child_id>GI120577</child_id>
    <date_of_birth>12/21/2011</date_of_birth>
    <service_coordinator>Thantabbar, Jasmine</service_coordinator>
    <status>Under IFSP</status>
    <site>Site JWB</site>
    <latest_referral_date>01/25/2012</latest_referral_date>
  </child>
</exported_children>
```

Figure 8: XML Format

Figure 9: PDF Format
### Search Result Report

**Basic Filters**
- Child Status: Referred, Pending, Under IFSP
- Child Group: All

**Advanced Filters**
- Eligibility Category: Medical Diagnosis
- Medical Diagnosis: Arthrogryposis Current Only: No

<table>
<thead>
<tr>
<th>Name</th>
<th>Child ID</th>
<th>Birth Date</th>
<th>Service Coordinator</th>
<th>Status</th>
<th>Site</th>
<th>Referral Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brice, Tracy</td>
<td>G1130372</td>
<td>11/15/2013</td>
<td>Oc, Chloe</td>
<td>Under IFSP</td>
<td>Site JB</td>
<td>12/04/2013</td>
</tr>
<tr>
<td>Treffriend, Erin (AKA Dengar, Peyton)</td>
<td>G122852</td>
<td>03/04/2012</td>
<td>Fellers, Dylan</td>
<td>Under IFSP</td>
<td>Site XCH</td>
<td>05/21/2012</td>
</tr>
<tr>
<td>Wolfsong, Katherine</td>
<td>G120577</td>
<td>12/21/2011</td>
<td>Thantabiar, Jasmine</td>
<td>Under IFSP</td>
<td>Site JB</td>
<td>01/25/2012</td>
</tr>
</tbody>
</table>

| Total: 6 | Referred: 0 | Pending: 0 | Under IFSP: 6 | Deactivated/Tracking: 0 |
Appendix A: Category Drop-downs and Associated Filters.

- **Drop-down Category:** Eligibility
  - Filters: Standard Score, Medical Diagnosis, Informed Clinical Opinion

- **Drop-down Category:** Service
  - Filters: Special Instruction, OT, PT, SLP Family Training, Assistive Technology, Audiology, Health Services, Medical, Nursing, Nutrition, Psychological, Respite Care

- **Drop-down Category:** Medical Diagnosis
  - Filters: 18 Q Deletion, 49 XXXXY Syndrome, Acardi Syndrome, Albinism, All unbalanced structural chromosome syndrome, Amyoplasia Congentia, Angelman Syndrome, Aniridia, Anophthalmia, Apert Syndrome, Arthrogryposis, Autistic Spectrum Disorders, Bardet-Biedl Syndrome

- **Drop-down Category:** Associated Phone Number
  - Filters: Child phone number(s)

- **Drop-down Category:** Service Coordinator
  - Filters: Service Coordinator names in the user’s early intervention program

- **Drop-down Category:** Service Provider
  - Filters: Service provider names in the user’s early intervention program

- **Drop-down Category:** Site
  - Filters: Site Locations

- **Drop-down Category:** Primary Language
  - Filters: Languages able to select at referral